

PHYXIUS

Program Leader

ORIENTATION OUTLINE

EMPLOYEE NAME Benjamin

Program Leader Start Date 04/21/23

The following tasks need to be completed as part of Program Leader Orientation. The Trainer should INITIAL AND DATE each area as they are completed. The tasks to complete are as follows.

Read Employee & Client Policy Book. Importance of knowing the policy book

On-Call Schedule & Procedures

- See Employee Policy Book

Place signed Program Leader Job Description in the employee file.

Completing Timecards/Payroll

- Approve shifts daily
- Check GPS location to ensure they are not falsifying their timesheets.
- Keep track of each employee's hours to ensure they are not going into overtime- OT results in you losing your \$25 per pay period bonus
- Separate hours into regular, holiday, vacation, training
- Send Michelle, Wayne, and Taylor a Deputy message stating who, if any, has overtime, office training and/or birthday.
- Let Office Advisors know if any employees don't have hours for a certain week

Review Scheduling of Hours

- There should be always 6 weeks of schedule out
- Make sure at least 3 days' worth of shifts are covered, no one is in OT, etc.
- Ensure that each employee has a consistent number of hours each pay.
- Specialist employees need 60 hours per pay period
- No one should be scheduled more than 40 hours per week
- Variable employees should not be regularly scheduled for 30 or more hours/wk. They can pick up hours but should not be scheduled that many.
- Check schedule regularly for time off requests and shift exchanges
- Check timesheets against the schedule for deviations.
- Have employees fill out their unavailability when they are hired and every school semester.
- Holiday schedule completed in Oct. picking order/number of shifts required based on seniority. Refer to the policy book for more detailed protocol.

Program Leader Hours

- You complete your own schedule
- Hours worked will vary depending on the needs of the house
- Program Leaders' non-direct care hours typically last 2 hours a day M-F.
- Inform Utility Program Lead or Director if you are ill
- Time off requests go to the Operations Supervisors and Directors
- Program Leaders are hourly employees and NEVER authorized for overtime. Hours should total 60-80 hours in a 2-week period.
- You should be at 40 hours if your house has overtime unless excused by Operations Supervisor or Director.

Holiday Working Requirements

- Program Leaders are not required to work holidays
- This includes New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, Christmas Day, Easter, and the Program Leaders birthday
- Program Leaders will be paid for holidays at regular time for 6 hours.

Staff Communication Log

- Read the communication log daily when you come to the house
- Write any important notes for staff in the communication log – be as detailed as possible. The com log may be considered a legal document.
- When asking staff to complete specific tasks, designate staff by name, and assign a set due date so you can hold the individual accountable.
- Make sure entries are appropriate and thorough
- Make sure the com log offers a balance of both positive support, and areas that need improvement. We do not want the log to turn into a joke, or a gripe log.

Petty Cash

- Petty cash gets sent to the office at the end of each month. The Office Advisors only reimburse petty cash as needed, so if you don't get your receipts and ledger in on time, you may miss a reimbursement.
- Audit to make sure all transactions are recorded, have receipts, and all math is correct
- **Every transaction from petty cash needs to be debited from the Monthly Budget Ledger.**
- Cross check to make sure entries in petty cash and the budget ledger match budget categories
- Audit the \$ ensuring that all receipts and cash is correct at least twice a week (once on Monday, once on Thursday or Friday)

Client Financials

- Check CSSP or Comprehensive Consent to see how often financial records should be sent to guardians/social workers

- Audit to make sure all transactions are recorded, have receipts, and all math is correct
- Audit the \$ ensuring that all receipts and cash is correct at least twice a week (once on Monday, once on Thursday or Friday)
- Ensure that all client bills are paid on time (pharmacy, any medical bills, etc)
- When a client gets a GRH housing form in the mail, send it to Lisa to complete.
- Stay connected with social worker about how much money clients have in their social welfare funds – clients may need to occasionally “spend down” money

Monthly Budget Ledger

- Check the budget ledger regularly to make sure the house is staying under budget
- If you find yourself going over in one area, try to save some money in another area if possible.
- Ask for approval from Directors for large purchases that will cause you to go over budget.
- Audit at least twice weekly to make sure math is correct and all transactions have been recorded
- At the end of the month, submit the budget ledger to the office. The more often it is updated/ audited during the month, the easier it is to finalize at the end of the month.

Calendar

- Set up activity calendar monthly
- Write all client appointments and activities on calendars so that all staff have easy access to what is going on at the house, and with the clients
- Add paydays and Wk1/Wk2 for reminders

Review Cleaning List

- Check cleaning list regularly to make sure tasks are getting done
- Review and make changes to cleaning list as necessary
- Counsel staff if they are not doing their part

Groceries/Supplies

- Make a menu for the house.
- The office has a Sam’s Club card you may check it out to go shopping for your house
- Groceries and supplies are separate transactions.
- Enter purchases on the budget ledger in the appropriate column
- Checks and receipts should be sent to the office following the shopping trip.
- Coupon clip, use sales to help make the week's menu, and shop around for good deals. Find good values.
- If you do not use it, you lose it. Use the remaining budget at the end of the month to stock up on pantry items or cleaning supplies.

Progress Notes/End of Shift Documentation

- Check progress notes when you come in for your shift
- Make sure that staff members are documenting in a professional manner
- Make sure that progress notes are thorough and include pertinent details
- Staff should start the progress notes with their name, and shift in parenthesis; they should end their note with their signature and a straight line to the end of the page.
- No empty lines can be left in the progress notes pages
- 24-hour account for each individual needs to be all inclusive.

Incident/ Emergency Reports & EUMR Book

- Review all incident/emergency reports & EUMRs that have been filled out for errors and accurate information – contact staff if changes need to be made prior to submitting paperwork to DC/DM.
- Make sure appropriate charting has been made in progress notes, etc.
- Ensure all parties have been notified within 24 hours (guardian, family, SW, other license holders)
- Send to DC/DM for review/signing within 3 days
- Mail copies to SW, guardian, family, other license holders (No later than 5 days for Incident/ Emergency Reports)
- Original goes in the Client Office Book

First Report of Injury (form & treatment) for staff injuries

- Contact DC/DM as soon as possible when someone is injured. Expect to hear from Laura for further instruction.
- Workers Compensation file in the cabinet have the forms that staff need to complete when injured.
- There is a highlighted guide indicating what the staff, Program Leaders, and Laura will complete.
- If staff seeks medical attention, they cannot return to work without the Workability form completed from their physician.
- If staff doesn't seek medical attention, they should write "Incident Only" on the top right corner of the First Report of Injury. This will protect both the staff and company if the need for medical attention arises in the future.
- Staff are welcome to seek medical treatment wherever they choose. St Cloud Medical group is familiar with our company, so there will be less paperwork to complete if they go there. After hours staff can go to CentraCare Urgency Center.
- Refer to the Workers Comp file and ask Laura if additional questions come up.

Client Dr. Appointments/ER

- Schedule client appointments as needed – update the clients Appointment Schedule in their book monthly.
- Make sure all medication changes are sent to the pharmacy, medications are delivered, and appropriate changes are made to the MAR.

- Medical Referral Forms should be brought to appointments and filled out by medical professionals, then placed in their office book
- Medical appointments should be charted in the progress notes
- For psych appts, fill out the Mental Health Referral Form and have Dr. sign all medication related forms that need to be signed (Physicians Orders, Poly-pharm Justification, Current RX)
- Do not send just any staff on appointments. Send someone who will listen and report accurate information.
- Psychiatric appointments and Neurology appointments need to have a Program Leader present.

Review Fire/Storm Drills/Emergency Exit

- Fire AND storm drills are conducted monthly
- Locate all emergency exits
- Make sure you complete the Fire/Storm drill reports and logs in their entirety.

Review Home Maintenance

- Fill out a new Task Bar on Samepage under “locations” and “Repairs”
- DC/DM must be notified of all large house problems (water in basements, large changes to the house, anything requiring immediate attention.)
- Check periodically if maintenance issues are getting resolved
- Some staff will volunteer to fix things. Talk to DM/DC to get John/Amy approval before authorizing them to fix things.

Van Maintenance

- Bring the van in for regular oil changes (every 3000-4000 miles) – tires should be rotated every other oil change
- Call the number posted at the house to set up an appointment.
- Notify John/Amy of any other vehicle issues prior to making the appropriate appointments
- Fill out vehicle maintenance log as needed
- File van mileage logs and refill as needed
- Free engine checkup at Auto Zone

End of month tasks

- Print MARs for each client – make sure month/year is appropriate, make any necessary changes. Put current copies of MARs in the Vehicle Book as well.
- Complete census on Samepage when requested by Lisa – every other Tuesday by 8am
- Print data sheets for all clients, log and file previous month’s data
- Send petty cash report and budget ledger to office
- Send credit card receipts and log to the office (1st and 16th of each month)

- Audit and file client financial records – send any necessary copies out to appropriate parties
- Check that fire/storm drill has been completed, and forms filed in Safety Book

Program Leader meetings

- Meetings are the 1st and 3rd Thursdays of the month, from 1:30pm to 3:30pm
- Come with your planner
- Take notes throughout the meeting and keep the Program Leader Meeting Agenda. This is full of information to refer back to.
- Record all training hours in your training logs
- Come to the meeting with your planner, pen, paper, any anything else that has been requested.

New hires

- Operations Advisors will review resumes, interview, and hire staff as needed
- Program Leaders are responsible to keep Operations Advisors informed of specific needs of your program so we know what weekend shift the new hire will be working, and details about the weekday hours the program has available so we can hire someone who will be of relevance for you.
- If you need someone who has morning availability Operations Advisors must know this.
- Once staff have been hired, the Operations Advisor will set up their first day of training with the Office Advisors. Then they will start their Star training. Once done with their Star Training, Nick will tag you on SamePage informing you of who your new hire is, what weekend they work, when their training needs to be completed by, and if they have completed T.I. class.
- Set up a training schedule for them – include the med demo, orientation packet, reading time, and shadow shifts
- Let them know when their first scheduled shift/weekend will be
- Give them contact phone numbers for the house, yourself, and the Operations Advisors
- Be welcoming and friendly! It is hard starting a new job.
- After they start working, contact them to see how things are going, and if they are feeling comfortable.
- Good communication is key to keeping our new hires on track.
- Keep the Schedule Blocks current. This is the tool we use to hire for your home.

Staff Training

- Staff need to complete yearly training through Star Services
- Schedule full-speed TI semi-annually
- After annuals, staff need to read all their paperwork and sign off on a client's DPF-025
- Program Leaders will schedule a Service Plan Review Meeting with their staff to ensure all staff are notified of any changes, and questions are answered
- The DC will send out the DPF-025 for them to sign through Adobe

Staff Wage Increases

- Office Advisors track staff's hours worked and give staff raises as they hit the designated hour milestones, specified in the policy book.
- Employees get a company sweatshirt after working for 2000 hours. The Office Advisors will track hours and reward these accordingly.

Employee counseling

- Inform your DC/DM about any staffing issues you observe yourself or that are reported to you by other staff
- Discuss the issue with the employee and devise a plan for improvement
- Record the conversation in the employee's Deputy Journal
- Be specific when recording tardies, absences, etc. Include date of shift, time shift was supposed to start, and when staff actually show up
- Have balance with your staff. You want to talk to them about things they are doing well with, in addition to areas that need improvement.

ESF Changes

- ESFs should be updated with any change in employee status (Specialist, Variable, LOA, return from LOA), position change (Program Leader), change in home house), raise, address, phone number, or name change
- Go onto Samepage under "ESJ Mindmap" and click on the corresponding topic, then click "+topic" add the staff's name and effective date.
- Click on the topic you just added and go into the chat bar, click on "Agenda" then "task," copy and paste the title of the topic you made, then tag the corresponding people in the chat bar of the task.
- Go onto the staff's deputy journal and add as many details as possible.
- Be thorough, have dates and important details included

Client Medications

- Most medications are delivered on a four-week cycle
- Some medications (OTC, creams, laxatives) need to be ordered when they are low.
- Check all medications when they arrive to make sure they match the MAR, that there are the correct number of pills, that all medications are accounted for, etc
- **Make sure you have current prescriptions for every medication, and it matches the instructions in our MAR.**
- Update the MAR with any medication changes made at client appointments
- Contact the pharmacy to double check they have received new orders for medications
- Review the Medication Administration Policy Book regularly for revisions.

Medication Errors

- Staff discovering medication errors should fill out the medication error/refusal report
- Report errors to DC/DM when clients did not get the medication at all, or if they got the wrong medication.
- Go over the error with the staff who made it – there is a section for them to fill out and a section for the Program Leader to sign
- If excessive errors are occurring, re-training on medications may be necessary
- File medication error reports with the employees file who made the mistake
- Missed documentation, call the staff, and inform them they have 24 hours to sign
- Never file a MAR that is missing documentation
- If a client refuses medication, we do not need to contact the team unless specified. Paperwork for the refusal will be filed in their Office Book

Medication Administration Review Record

- These are found in your filing cabinet under (Medication)
- It must be done at the end of every month.
- Before you file MAR's away you need to identify all medication administration Errors discovered during the month for each client in your program.
- To make this easy to identify. When you discover a Med Error, and you write up a medication administration error report just make a copy of it. Original goes into employee file and copy you keep until you transfer that data onto Medication Administration Review Record at the end of the month.

Client Programs

- Review client programs to make sure they are still relevant, effective, etc.
- Work with your DC/DM to revise programs when changes are necessary
- Sign up for a Clinical as needed to discuss client concerns, changes in behaviors, etc. These are on Wednesdays with John, your DC and DM.

Annual Meetings

- Refer to "Service Plan Review Meeting Prep Sheet" sheet on Samepage as a reference for paperwork that needs to be completed
- You are responsible for everything in yellow
- Paperwork is due to your DC by the 15th of the month, the month prior to your meeting.
- Coordinate with DC/DM, Guardians, Social Workers, and any other important team members to set up a time for annual meeting at least two months in advance.
- Review client IAPP, CSSP (A), and Self-Management Assessment and coordinate any changes with day program
- Sort all paperwork into nice piles prior to the meeting. You should have a pile of papers for the family/guardian, social worker, client, John/Amy, Operations Advisor, work, and yourself. Put flags/highlight areas that you need signed and returned to you. This will ensure a signature is not missed.

- Following the meeting go through the clients' big book, and pull out all the old consents and paperwork, and replace it with all the new stuff. This will allow you to double check you have everything. File the old stuff in the overflow.
- When presenting at the Annual Meeting speak clearly, confidently, loud enough for everyone to hear, and present the information in a positive upbeat manner. Remember you are talking about someone's child/relative. The team wants to hear the fun stories, and good things the client is doing.
- Be organized, ready to answer questions, and on task to keep the flow of the meeting moving along nicely. We do not want to rush the meeting, but we also do not want long pauses of silence.
- *Covid* Offer for Phyxius to send out the zoom link, when sent, attach paperwork you will be reviewing at the meeting. After the meeting DC will send out for Signatures through Adobe. Ask the team if anyone prefers mailed copies.

Communication

- Keep DC/DM in the loop with any staffing issues, client behaviors, guardian's concerns, etc.
- Contact family/guardians at least every other week by email or phone call (some families will require more frequent contact) to update them on how the clients are doing. Include concerns, good things, cute stories, etc. – Contact more often if any issues arise. If you choose to call, sum up your chat and email the Operations Advisors
- Email social workers (include DC/DM) at least every other week to update them on how the clients are doing. Include concerns, good things, cute stories, etc. – Contact more often if any issues arise. Get reports from staff on how things are going with both the other staff and the clients during times you are not at the house yourself. Remember HIPAA privacy. Don't include "Protected Health Information" (ex. diagnosis, med changes, doctor visits, date of birth, social security number, address, client name, etc) in an email. Try to refer to the person as "him," "her," or their initials if necessary. All updates that would include Protected Health Information should be done over the phone.
- Stay in touch with your staff. Try to see them face to face as much as possible. Be flexible with your schedule to allow the opportunity to connect with all your staff, especially new staff, and anyone we have concerns about. You are the "main connector" between the staff and the rest of the team (clients, families, social workers, DC/DM, John, and Amy), so be approachable, available, and friendly.
- In person, phone and email are approved methods of communicating with your staff members, and your co-workers. If a staff text messages you, please kindly remind them that you can receive their texts, but not respond to them. Text

messaging is still not an approved form of appropriate communication in the workplace.

Ownership of Your Home

- Take pride in your house!
- Take it personal.
- Responsible for the success of the program.
- The house and staff reflect you.
- Have a critical eye and personalize your program.

House Rules

- Each house has a list of rules. These rules serve as guidance and structure for our clients. These rules can be updated or modified on a regular basis, depending upon the needs of the clients.
- At times it may be nice to talk with your staff about the rules. What is working, what is not? Getting input from your staff is crucial to developing an effective structure.

Dealing with House Drama

- Address concerns as they arise. The longer a concern exists, the more impact it will have on the morale of the house.
- Stay in contact with your staff. Ask what is working, what is not.
- Ask the questions you do not want the answers to. Doing so will bring clarity and insight into how your staff feel about the work environment and their co-workers.
- If an issue has been addressed with an employee, and you do not see any improvement. Bring the concern and discuss it with your DC/DM

Completing Client Taxes

- Taxes are completed every year for our clients, ask the guardians if they would prefer to do them or if they would like us to complete them.
- Program Leaders will delegate a staff to take each client to get their taxes completed.
- There are several places that offer free tax preparation for our clients. Salvation Army, Catholic Charities, St. Cloud Technical college. Call ahead for an appointment.
- Bring something to keep the client occupied as it can be a long wait time.

County Licensing Packets

- The programs are relicensed by the county on a yearly basis. Every other year, the program will have a paperwork relicensing while opposite years will have a site visit.
- Prior to a site visit, make sure the program is clean and presentable, make sure the staff working that day knows licensing will be coming.
- John will receive the packet and fill out his portions. He will then pass the packet down to Laura. The Program Leader will complete the licensing packet and return it to Laura
- Keeping employee files current will assist you in making the relicensing process easier.

First Aid/Tornado Kit

- Both first aid and tornado kits must be audited monthly. Anything missing or expired must be replaced.
- Lists for both kits are located under the 245D file under the misc. file. When having a staff audit these kits, make sure they utilize a list to ensure accuracy.

Direct Care

- Program Leaders are expected to work Direct Care hours. The amount of Direct Care you will be required to work is between 20-30 hours per week.
- Sometimes the quickest way to build a team and gain the respect of your staff is to help them out when they are in a pinch. We do not want you to be taken advantage of, but if all other options have been exhausted and someone needs a favor, for the Program Leader to help goes a long way for the entire house. Be open to working a variety of shifts for your team.
- As a Program Leader you will need to assist in cleaning the house, performing client care, etc. to teach your staff, as well as demonstrate leadership skills. As a leader you should not expect your staff to perform a task that you are unwilling to do yourself, or that you do not know how to do yourself. Although you will not routinely have to do each job, you are expected to be able to perform every job in the house. You must be the expert in your house.

Attitude

- A positive, upbeat, attitude is KEY to your success as a Program Leader.
- Your employees are your biggest asset. You are only as good as your worst employee. Remember that and strive to bring those individuals up to the level we find acceptable.
- Not every employee will be good enough to be a Program Leader, an Operations Advisor, or an owner. That is not a bad thing. We hire a range of employees and appreciate the balance.
- Each employee has positive attributes. Part of your job as a Program Leader is to extract those strengths and run with it. Not everyone will be like you, look like you, or think like you. Again, that is a good thing. We want diversity, and diverse ways of thinking, acting, and performing. The only quality we ask ALL our staff

to possess is a positive attitude. The only job function we ask ALL our staff to perform is to take exceptional care of our clients.

I have read and reviewed the information outlined above. The issues have been reviewed by me and the Operations Advisor. All of my questions have been answered. I agree and accept to the following of these guidelines and perform the duties in my Program Leader Orientation Training.

Date of Final Completion

04/21/23

Benjamin

Benjamin (Apr 21, 2023 10:49 CDT)

Program Leader Signature

Cass Heath-Rodriguez

Operations Supervisor

(The Operations Supervisor that reviewed this packet, ensuring all items have been signed off, and trained on)

BL PL Orientation Packet

Final Audit Report

2023-04-21

Created:	2023-04-21
By:	cass (cass@phyxiusinc.com)
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-  Document created by cass (cass@phyxiusinc.com)
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-  Signer ben (benjaminlarsen000@gmail.com) entered name at signing as Benjamin
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-  Document e-signed by Benjamin (benjaminlarsen000@gmail.com)
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Adobe Acrobat Sign

Ben Larson

Completed by:
Christine A.

Specialist Competency Key

Hello Program Leads. This is a guide and explanation for our new Specialist Competency Guide. This is a guide we are incorporating to help you train your specialists in quicker, more thoroughly, and ensure they are ready to start doing training with Cass. Below I will further expand on each item on the Competency List, so you know what we are looking for.

Financials- We are looking for Specialists to know how to get financials in halfway through the month, turning in credit card logs, petty cash log and able to complete the Monthly Budget Ledger each month.

Date Trained: 1/13/23 Trainer: Christina Anderson Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Proficient in Word/Excel- Everyone learns at different speeds and has vastly different levels of skill when it comes to technology. What we are looking for is that they can complete tasks on these programs without constant assistance. It's not a good use of time for Cass to be teaching these Specialists the basics of these programs.

Date Trained: 1/13/23 Trainer: Christina Anderson Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Data Collection- A good time to collect data when they take last months data to the office. This is the data collected for their goals, and outcomes. A good way to collect data each month and have it ready for when you make a progress report is to put a sticky note on the front of their charting that labels the data collection totals, percentages, etc. This is not only a good habit but also is great for them to learn the programs and some of the things we do as a PL. They should learn and be knowledgeable on how each outcome is calculated.

Date Trained: 1/13/23 Trainer: Christina Anderson Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Client Tracker- These are every two weeks. They should be aware of these and how to complete them.

Date Trained: 1/11/23 Trainer: Christina A. Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Appointments- The Specialist should have a good handle on appointments, how to handle them, and filling out the proper paperwork. They don't have to know the exact paperwork for a Psyche/Neurologist appointment, but they should be able to complete these appointments with your guidance.

Date Trained: 1/11/23 Trainer: Christina A. Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Monthlies- They should be able to do this on their own. They should also be comfortable with the monthlies format and how to change data collection sheets or create new ones when needed.

Date Trained: 12/28/23 Trainer: Christina Anderson Signature: Christina Anderson
Date of Competency: 4/15/23 Assessor: Cass Heath Signature: Cass Heath

Good Communication- We don't want to consider someone for a PL position if they are hard to get in contact with. It's a huge time waster. Please emphasize the important of great communication to them and ensure they do in fact have good communication before considering them for a PL position.

Date Trained: 1/11/23 Trainer: Christina A Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Missing Signatures- They should know how to do missing signature lists for the MAR and Progress Books, also should follow up to ensure the signatures are completed.

Date Trained: 1/11/23 Trainer: Christina A Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Good Progress Notes- Please check their progress notes, offering feedback, guidance, and following up with them if necessary. It's important to be able to write a good progress note as a Program Leader to set an example for your staff and the quality expected from them.

Date Trained: 1/11/23 Trainer: Christina Anderson Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Medication Reordering- They should know how to contact the Pharmacy to reorder medications, discuss medication concerns, bills payment for individuals, etc.

Date Trained: 1/11/23 Trainer: Christina Anderson Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Incident Reports/EUMRs- They should have a good idea of what constitutes as an Incident and that it's required to contact Guardian and Social Worker with 24 hours and be able to fill out an Incident Report in a timely fashion. They may still need some guidance on filling out Incident Reports but it's important they understand the urgency of them and the process.

Date Trained: 1/11/23 Trainer: Christina Anderson Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Medication Error Reports- They need to know the protocol of what to do when a Medication Error occurs and how to do Medication Error Reports.

Date Trained: 1/11/23 Trainer: Christina Anderson Signature: Christina Anderson
Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Knowledge of Program- They must be able to run the program and have a good understanding of it.

Date Trained: 1/11/23 Trainer: Christina Anderson Signature: Christina Anderson

Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Scheduling Basics- They should work on scheduling with you to learn the basics and process of how it works before training with Cass.

Date Trained: 1/11/23 Trainer: Christina A Signature: Christina Anderson

Date of Competency: 4/13/23 Assessor: Cass Heath Signature: Cass Heath

Additional Criteria to be Assessed before training with Cass:

Interested in PL- Please make sure they are interested before setting them up with Cass. If they are just curious or have a bit of interest, it's best to train them more yourself and check in periodically about where they are at.

Date Interest Confirmed: 12/17/22 Name of person they spoke with Christina

Driver- You need to be a driver for the company to be a PL.

Verified driver? Date: _____ Signature of person verifying: Cass Heath

1,000 hours worked- Specialist needs to have worked 1,000 before training to become a PL

Date hours verified: _____ Person Verifying: Cass Heath

Check Counseling Records- Specialist must not have any serious performance issues for 3 months or any attendance or minor performance issues for 4 weeks prior to training with Cass

Date counseling record was checked and to standard: 1/11/23 Person Checking: Cass Heath

***Training with Cass is an 8 week training curriculum (4 weeks of training on material, 4 weeks of running the house)**